

*Welcome to AARP Virginia Tax-Aide*  
Christiansburg, VA

January 2023

**Operating hours:**  
**1pm-4pm Mon., Tue. Thurs.**  
**9 am – 12 noon Saturday**

Volunteers are ready to assist you in filing your tax return; however, our procedures are not back to normal. This year we will offer two methods for tax preparation:

- **Same Day Drop Off** – you will bring in your tax documents (no envelopes, just documents), we will review these with you and then ask that you be available to sign and pick up your tax return. This should be within an hour. We will call when they are ready so be sure we have a good phone number for you.
- **Scan** and you return with an appointment for another day. This is how we operated last year and works better for some clients. We will review your documents and make you a second appointment to return when the taxes are ready. We scan your documents and return documents to you. Appointment times will be designated for either drop off or scan.

We have developed this packet for taxpayers to use this year. Here is what this means to you:

- You will need to fill out forms. All the forms in this packet are needed to prepare your return. There is a checklist to make sure you are ready when you call for an appointment. When you call, please indicate if you will be doing Same Day Drop Off or wish to Scan and return another day.
- If you have problems filling out these forms, get help from a family member or friend. Do your best to completely fill out the forms. Your conversation with one of our volunteers will be limited.
- Be sure that we have a good telephone number for you.
- We will call with any questions. If you are using Same Day Drop Off, we will notify you when it is time to come back and pick up your tax return, so it is **imperative that we have a good telephone number for you**. As always, we will electronically file your taxes while you are with us.
- After your appointment – be sure that you have all your tax documents returned to you. If we scan information, **we must return all documents to the client**. If you are using Same Day Drop Off, we will return your id and social security cards but keep the tax documents to prepare your taxes. You **must** return that same day to pick up your information.

We need you to be flexible and understanding as we go down this most unusual road of volunteer service in these challenging times. Our intent is still to have you bring us your tax information and we return it to you as we have in the past – just with less face-to-face contact.

**Contents of packet:**

- **Cover Letter**
- **Mask Wearing**
- **Scope – this is what returns we can do this year.**
- **Checklist of what to bring.**
- **Intake/Interview & Quality Review Sheet – it will be helpful if you can refer to the Intake Form from last year when filling in this information. Fill out before your appointment.**

# **Mask Wearing**

**Mask Wearing is highly recommended when visiting the AARP Tax-Aide Site. Masking is not required but we are stressing the use of masks due to the high case numbers of Flu, RSV, and Covid in our local area.**

**While you, the client, has limited contact with our volunteers, the volunteers are in contact with numerous individuals. So, for the safety of our volunteers we hope that you will consider wearing a mask while visiting the Site.**

**AARP wants to serve the community with this wonderful service but at the same time, keep the volunteers and clients as safe as possible.**

**Thank you!**

## Scope

### ***What we can do:***

***W2 (normal wage statements)***

***1099R (retirement income)***

***1099 Div (dividends)***

***1099 Int (interest)***

***1099 Misc (other income)***

***1099 NEC***

***K1 (interest and dividends only)***

***1099B – Brokerage Statement – we may be able to complete for you depending on the complexity of statement. When you check in, we will review your documents.***

***1099G***

***Railroad Retirement***

***Self-Employment – If you are self-employed and do not have any forms used for Covid relief, we will do your taxes.***

***Amended returns if our site prepared your taxes last year and original return has been processed.***

### ***These additional items are out of scope for us and we can NOT do a return:***

***COD Foreclosure***

***Part Year Virginia returns***

***Sale of home with 1099-S***

***No Self-Emp. (with Covid forms)***

***Taxable Scholarship / grants***

***Farm Income/expenses***

***Rental income of homes, apts.***

***EITC disallowance***

***Non-Virginia State returns***

***Royalty income with expenses***

## Taxpayer Checklist

1. What to bring
2. How to package it – sort into these categories
3. Do not bring envelopes – just the tax documents.

### Personal Information

- Previous year's tax return
- Photo-ID for taxpayer and spouse
- Social Security cards for everyone on your return
- Bank account number & routing number
- Identity Protection PIN (if you have one)

### Income

- W-2 from each employer
- Unemployment 1099-G statement
- SSA-1099 Social Security Statement
- All other 1099 income forms received

### Payments

- Records of federal / state estimated payments

### Deductions

The Standard Deduction is available to all

### Health Insurance

- Marketplace Insurance (1095-A)

### Credits

- Dependent Care provider information
- Education expense statement (1098-T)
- Copy of school account
- Student Loan Interest paid (1098-E)
- Long Term Health Care payments (credit on state return)

### Payment/Refunds

- Copy of a voided check.

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If we must call you, we have a special telephone number that you will not recognize. On your caller ID, you will see **540-315-7367**

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